

Management System: Requirements Management

Subject Area: Document Control Management

Exhibit 3: Procedure Template

Issue Date: 7/26/12

Revision: 0

The Procedure Template (MS Word) provides the structure for documenting a Procedure. Copy the Template into a folder on your computer.

A. Header Information

Procedure Title: The title should be intuitive and easy for users to find in an alphabetical list and should use an action verb (e.g., Preparing Design Plans).

Issue Date: Leave blank during reengineering. This section will ultimately show the date this Procedure is to be published online in the CBC MS.

Revision Number: "Revision" is the most widely-used term for referring to that attribute which distinguishes one closely-related design iteration from another. A revision represents a change to a document's contents, or a modification to a part such that the part remains interchangeable with its previous iteration.

Lead Subject Matter Expert: List the individual that EMCBC staff should contact if they have questions about this procedure.

Management System Owner: Enter the Management System Owner in this section.

B. Procedure Content

Procedures tell users "how."

- Write steps that are concise.
- Use short sentences.
- Write steps as positive commands.
- Construct sentences using active voice.
- Do not use "should" when referencing a requirement (e.g, DOE Directive).

1. Applicability

Identify which EMCBC staff will use the procedure and under what circumstances, if relevant. Since there are very few procedures that apply to all EMCBC staff, please be specific. Begin the section with the following sentence, “*This procedure applies to . . .*.”

Example:

“This procedure applies to EMCBC staff who prepares performance goals and measures for employee performance appraisals. This includes all managers, supervisors, and those employees designated by their supervisor.”

2. Required Procedure

- If needed, write a summary statement as an introduction describing the goal of the procedure.
- Define and describe each step in order.
- Use active voice.
- Identify who performs the step.
- Spell out acronyms the first time they appear in the procedure.
- If you would like to add a hyperlink, underline it and provide the URL.
- Use “NOTES” for information that is not required to implement the step.
- Identify the Records generated by implementation of the Procedure. (See Step 3 and Section 4 below for examples.)
- Provide flowchart of the process.

Step 1	<p>The approving manager identifies a staff member as a P-Card holder.</p> <p>NOTE: An approving official cannot be responsible for more than five P-Card holders unless approval has been granted from the P-Card Program Office.</p>
Step 2	<p>The assigned staff member completes a Purchasing Card Request Form.</p>
Step 3	<p>In Section 4 of the Procedure, identify the Records generated by implementation of the procedure by inserting the following language and sample schedule data in Table format.</p> <p>Records generated through implementation of this procedure are identified as follows, and are maintained by the (originating office or individual) in accordance with the EMCBC Organizational File Plan:</p> <p>Records Category Code: Example - ADM 03-03-A1B</p> <p>Records Title: Example - Routine Procurement Files. Transactions Below the</p>

	Simplified Threshold – P-Card Holder Files (Office of Contracting) Responsible Organization: Example - Office of Contracting QA Classification: Example, Non-Permanent, Lifetime or Not Applicable
Step 4	As a last step in the procedure, provide a flow chart of the process (if applicable).

3. References – Forms/Attachments/Exhibits

List all other documents, forms, attachments, exhibits cited in this Procedure.

4. Records Generated

Records generated through implementation of this procedure are identified as follows, and are maintained by the (originating office or individual) in accordance with the EMCBC Organizational File Plan:

Records Category Code	Records Title	Responsible Organization	QA Classification (Lifetime or Non-Permanent)
Example: ADM 16-01.5-B-[OTS]	Vital Records Inventory	Office of Technical & Asset Management	Lifetime

5. On Last Page Add EMCBC Record of Decision

EMCBC RECORD OF REVISION

DOCUMENT TITLE:

If there are changes to the controlled document, the revision number increases by one. Indicate changes by one of the following:

- I Placing a vertical black line in the margin adjacent to sentence or paragraph that was revised.
- I Placing the words GENERAL REVISION at the beginning of the text.

Rev. No.	Description of Changes	Revision on Pages	Date
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EMCBC RECORD OF REVISION

DOCUMENT TITLE: Procedure Template

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<u>Rev. No.</u>	<u>Description of Changes</u>	<u>Revision on Pages</u>	<u>Date</u>
0	Initial Description of Procedure Template		7/26/12